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by A.J. Veal

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Simon Darcy, School Research Director

School of Leisure & Tourism Studies, University of Technology, Sydney, PO Box 222, Lindfield, NSW 2070
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Contemporary Trends and Issues in Australian Leisure - Planning Implications

A. J. Veal

School of Leisure, Sport and Tourism, University of Technology, Sydney,

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1. Introduction

It might be expected that a paper with a title like this one's would provide hard information on *what is happening and what is going to happen* in leisure - information that audience members could take away with them and act on within their own community or organisation. There are two, connected, reasons why this approach is not being adopted here. Firstly, we do not have good data on 'what is happening' in Australia as regards leisure, so the basis for predicting 'what will happen' is weak. Secondly, information on national, and even international, trends in leisure tastes and behaviour, while always interesting, may be of limited use at the local level, particularly if the local planning and decision-making environment is not designed to make use of such information. The bulk of the paper concentrates on the second of these issues, but the first is discussed briefly below.

2. The data gaps

What do Australians do in their leisure time? Occasional newspaper headlines screaming 'A Nation of Couch Potatoes!' suggest that there is plenty of information available, but this is not the case. The seven national Recreation Participation Surveys commissioned by the Department of the Environment, Arts, Sport and Territories between 1985 and 1991, though limited by a small sample size (some 2000 each), nevertheless began to provide a time series of data on Australians' participation in some 70 home-based, informal outdoor recreation, sports, arts and social activities[1]. Since 1993, responsibility for conducting participation surveys has been assumed by the Australian Bureau of Statistics, using its Population Survey Monitor. This is a survey conducted on a much larger scale, with samples of over 20,000 annually. Unfortunately, this new arrangement has two drawbacks: firstly, the design is not comparable to the previous surveys, so it is not possible to examine trends between the late 1980s and the 1990s, so the trend series must start again. This problem will be overcome in time, but the second, more serious, problem is that the survey no longer covers the whole of leisure, but is confined to just 42 *sport and physical recreation* activities (ABS, 1997). Thus informal outdoor recreation, arts and social activities are excluded. Because of sample size restrictions, the number of activities which can be reported for individual states is smaller - in the case of Western Australia, the 1995-96 data cover only 15 activities.

The data gap on leisure participation is not unique to Australia, although some countries have been better at maintaining the flow of data than others (see Cushman *et al.*, 1996). In a few years time, provided the ABS continues to include the relevant questions in its Population Survey Monitor, we will be able to discuss trends in participation in a range of sport and physical recreation activities, at least at national level, but we will still not be able to examine trends in other, non-sporting, leisure activities.

3. Addressing the future at local level

This paper is addressed primarily to leisure service providers or, more precisely, those responsible for leisure service provision - primarily local authorities, but also State governments and their agencies and non-profit organisations.

It is recognised that substantial changes in patterns of leisure service provision have taken place over recent years, with public sector organisations tending to move from being direct providers of services to being agencies which increasingly commission or support others to provide services. Regardless of one's views of these changes, they bring into focus one of the roles which only government can play: that is to address the issue of 'leisure in the community' in a comprehensive manner. If direct provision by councils is to be restricted to fewer and fewer areas and if councils are to become an agency which commissions appropriate services to be provided on behalf of the community, this suggests that a broader, more flexible approach to the consideration of 'leisure in the community', and particularly 'future leisure scenarios for the community' might be adopted.

In the past, many local leisure or recreation plans and policy documents have given the impression of being comprehensive in their consideration of leisure but, in practice, have not been. In the opening chapter of these documents we often see broad-ranging definitions of leisure, or recreation, which include everything that individuals do in their free-time - the implication being that the document deals with the whole of leisure or recreation. Objectives are declared which indicate concern for the *overall* recreational opportunity of the community and its contribution to the quality of life. However, in subsequent chapters, only those facilities and services for which the authority is directly responsible are generally examined. Thus the documents give consideration to public open space and to sporting, play and cultural facilities provided by the council, but they frequently ignore private open space and sporting, play, cultural and social facilities and services provided by others - including commercial, non-profit and even other public sector providers. It is not clear how a complete assessment of needs and unmet needs can be made if major aspects of provision are ignored. It is also notable that, despite their apparent concern for the leisure of the citizen, policy documents tend to ignore activities which take place outside the municipal boundaries - either day-trip activities over the border, or holidays. As councils play a lesser role as direct providers, this undue concentration on their 'own patch', seems less and less appropriate.

A possible technique which would enable a more comprehensive stance to be adopted, is a research-based 'matrix' approach to local leisure planning and policy-making (Veal, 1994, p. 95). The technique can also facilitate a locally-based approach to forecasting.
Figure 1 is a simplified version of a matrix. It shows a community with just three leisure facilities and three social groups. In practice there would, of course, be many more facilities, perhaps arranged in groups (eg. outdoor recreation, arts, play, entertain-ment). Social groups would also be more numerous, including age, gender, ethnic and income or occupational groups, and they could also include geographical areas of the community. The visit data for the body of the table would come from a mixture of social surveys, facility user surveys, facility usage data and the population data from the census. The hypothetical data in Figure 1 show that Social Group A is the best served by the available provision, with 30 visits per 100 population per week, while Social Group C is the least well served, with only 10 visits per 100 population.

The important point about the matrix is that the whole community should be included in its various social groupings, and that as wide a range of leisure facilities/services should also be included, regardless of provider. In this way, it can be seen that different social groups make use of different types of leisure facility or service - in particular some groups make more use of private sector provision while others make more use of the public sector.

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Figure 1. Hypothetical matrix

	Group A	*Group B*	*Group C*	*Total*
	Visits per week			
Facility/ service 1	1000	3000	1000	5000
Facility/ service 2	3000	500	500	4000
Facility/ service 3	2000	5500	2500	10000
Total visits	6000	9000	4000	19000
Population	20,000	45,000	40,000	105,000
Visits/week/ 100 popn	30	20	10	18.1

The matrix can provide a rich source of information upon which to base current provision policies, but it can also provide a framework for examining the future. This can be achieved in a number of ways, including the examination of local demand trends, examination of demographic and socio-economic change and qualitative approaches. These approaches are discussed in turn below.

Local trends

Firstly, as indicated above, while national trend data may be of interest for comparison purposes, local planning requires local data. For example, while national data may indicate rapidly growing use of casinos, this is unlikely to apply to a community which is 500 km from the nearest casino. Or, a local community could experience a boom in demand for a particular team sport, against national trends, because of the existence of a well-managed and promoted junior league.. Further, if a local council is implementing certain policies in relation to certain types of leisure facilities or programs, and perhaps setting performance targets for the organisations managing those facilities or programs, it would expect to see results over a period of time. For example, the opening of a theatre would be expected to result in a boom in theatre-going. And it would be interested in understanding the effects of those outcomes on the overall pattern of leisure participation. Which particular groups have benefited from the increased level of service? And does an increase in participation in one area lead to a decrease in participation in another? A locally based matrix, updated on a regular basis, can therefore become the source of locally relevant trend data. For organisations with state-wide respons-ibilities, 'local' can refer to the state.

One of the perceived problems in such an approach is the cost of establishing and maintaining a matrix. It could be argued that local authorities have traditionally spent too little on research for policy development and performance monitoring in the leisure area and that, in relation to most annual budgets, the cost of this exercise would be modest. But it is also the case that a matrix could be established at very little cost, making use of existing data and informed 'guesstimates': it might be seen as simply a means by which already existing formal and informal data are marshalled. Data gaps in the matrix could provide a research agenda for the organisation, which could be undertaken in-house, or by consultants or students.

Demographic and socio-economic change

The 'population' row of the matrix is subject to future change which can, to some extent, be anticipated. For example, if Social Groups A, B and C are young, middle-aged and older *age groups* respectively, then, in most communities, reflecting the overall aging of the population, Group C can be expected to increase at the expense of group A and, probably, group B. The anticipated changes in the rates of growth of various age-groups at national level are shown in Figure 2 and in Western Australia in Figure 3. It is relatively easy to use these demo-graphic changes to indicate likely changes in recreation demand at national or state level (see Appendix 1). While such projections can provide useful background information, local conditions can differ substantially from national or state conditions.

Most local authorities are able to produce their own local population projections. While some exhibit trends similar to the national or state ones, others are very different - for example the growing suburbs on the edge of large cities.

Figure 4 shows how projections might be portrayed in a matrix. The effect on visits (d) is found by multiplying the visit rate (a) by the change in population (c). The resultant projections suggest a shift in demand from Group A, towards Groups B and C. Further analysis would be undertaken to suggest which facilities/services could be expected to experience the change in demand and this would provide a basis for considering how the council should respond, if at all

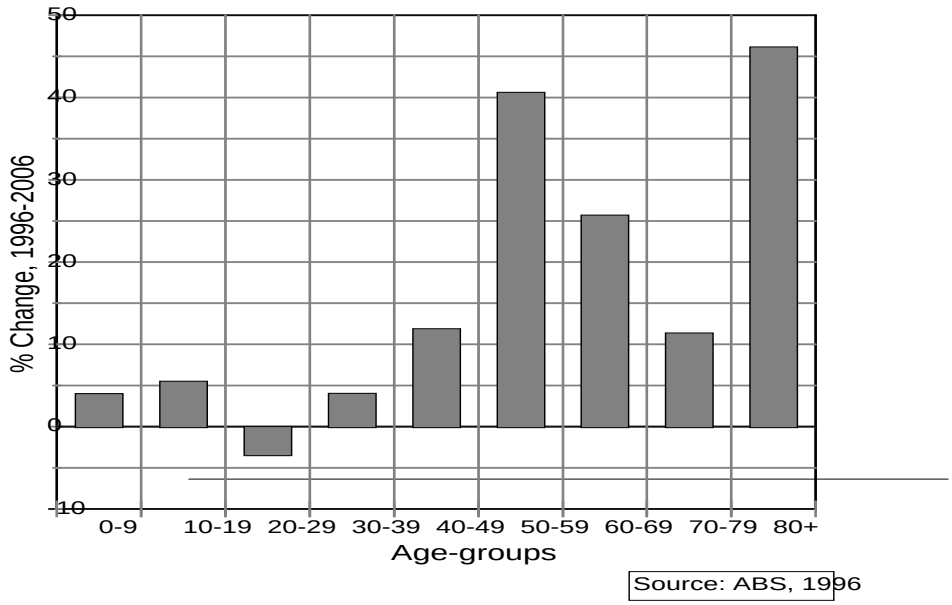

Figure 2: Population change by age-group, Australia, 1996-2006

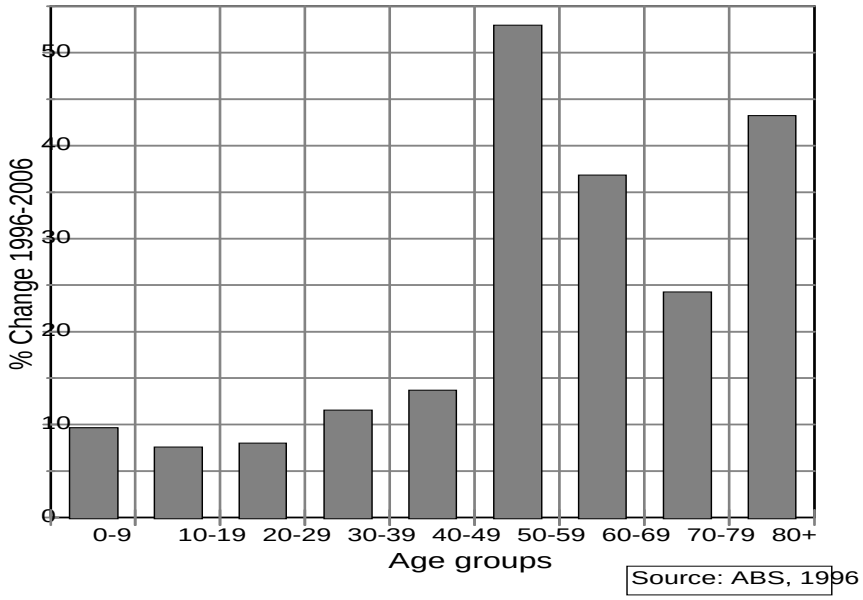

Figure 3: Population change by age-group, Western Australia, 1996-2006

Figure 4: Matrix with Projections

	Visits per week			
	Social Group A	*Social Group B*	*Social Group C*	*Total*
Facility/service 1	1000	3000	1000	5000
Facility/service 2	3000	500	500	4000
Facility/service 3	2000	5500	2500	10,000
Total visits	6000	9000	4000	19,000
Current Population	200	450	400	1050
Visits per 100 (a)	30	20	10	18
Projected Popn (year 2006) (b)	**180**	**500**	**600**	**1280**
Change in population (c)	**-20**	**+50**	**+200**	**+230**
Effect on visits (d)	**-600**	**+1000**	**+2000**	**+2400**

Qualitative inputs

The matrix also provides an opportunity to use qualitative methods for exploring the future at local level. Two related methods might be used: the *Delphi technique* and *scenario drawing*[2].

'Delphi' refers to the Delphic Oracle who foretold people's fortunes in classical Greece. The modern Delphi technique involves asking a panel of experts about their view of the future in their area of expertise. The panel can range in size from as few as a dozen or so to several hundred.

In Round 1 of the process experts are asked a specific question on the major changes they

expect to see in their field of expertise over the next, say, five or twenty years, or they may be asked to indicate the probability of a number of possible future events taking place. Responses from Round 1 are summarised and fed back to the panel of experts for Round 2 questioning. Round 2, and possibly Round 3, information is collated to provide forecasts. The technique can be useful in addressing issues such as technological change and 'product life-cycles', since people closely involved in an industry should be able to base their predictions on their knowledge of product development going on in the industry and the time likely to elapse before a 'product' reaches and is adopted within the market place. It is possible to envisage such a technique being used at local level, involving managers, professionals and business people involved with leisure provision. User groups could also be involved. Questions would cover issues on likely trends in demand and provision and would bring to the fore information on existing facilities and services and their utilisation, from a number of viewpoints. As well as general trends, issues related to specific facilities or services could be included, such as the anticipated obsolescence of a building.

Since it is unlikely that a clear consensus would reached among such a diverse range of 'experts', alternative 'scenarios' could be drawn up, the scenarios being in the form of alternative matrices. Such an exercise could include appropriate information on trends from outside the local community - for example, trends in technology with which local community members might not be familiar - or such information could be fed into one or more of the Delphi rounds. The alternative scenarios/matrices would provide the basis for policy decisions. An example of what a simplified matrix could look like with qualitative information added is shown in Figure 5.

Figure 5: Matrix with Qualitative Information

		Visits per week			
	Qualitative information	*Social Group A*	*Social Group B*	*Social Group C*	*Total*
Facility/service 1	Centre to be replaced in 2003 ($400k). State trends down.	1000	3000	1000	5000
Facility/service 2	Cost escalation due to new regs: will reduce demand.	3000	500	500	4000
Facility/service 3	Olympic Games could boost interest. State trends up.	2000	5500	2500	10,000
Total visits		6000	9000	4000	19,000
Current Population		200	450	400	1050
Visits per 100 (a)		30	20	10	18
Projected Popn (2006) (b)		**180**	**500**	**600**	**1280**
Change in population (c)		**-20**	**+50**	**+200**	**+230**
Effect on visits (d)		**-600**	**+1000**	**+2000**	**+2400**

While the matrix method was originally proposed some 15 years ago[3], its use has been limited. Certainly there is no known example of its use with the general public, as suggested above. The approach offers a number of challenges related to just how a fully developed matrix, which could be quite complex, might be used in practice and, for example, presented

to a lay audience.

4. Conclusion

The aim of this paper has been to develop an approach to leisure forecasting and planning at the local level. Rather than relying on national or state trend data, it is argued that local communities should build their own data-base on trends, to provide a basis for policy-making and forecasting.

The matrix method presented involves five important features:

1. it is comprehensive, potentially involving all leisure activities and providers;
2. it is based on a research base using local data;
3. it can provide the basis for a research agenda
4. it can include qualitative as well as quantitative information;
5. it can involve consultation with local stake-holders.

Notes

1. Reports on the national Recreation Participation Surveys were published by DASET in its various forms (1986, 1986a, 1986b, 1986c, 1988, 1988a, 1989, 1991) and have been summarised and commented upon by Veal (1993, 1993a), Lynch and Veal (1996, Ch. 5), Darcy (1994) and Darcy and Veal (1996).
2. For a discussion of leisure forecasting methods in general, see Veal, 1994, chapter 7.
3. See Veal, 1982

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Appendix 1: Demographic Change and Leisure Participation in Australia: 1994-2001

These projections are for 1994-2001, rather than 1996-2006, but illustrate the effects of demographic trends which are known to be continuing. The activities are just a selection from Table 17.2 of Lynch and Veal (1996, p. 355). It will be noted that activities which everyone does, such as watching TV, are projected to increase at about the same rate as the population as a whole (around 8.5%); activities popular with older people are projected to increase faster than this, and activities popular with younger people to grow more slowly or decline.

	Participants per week, '000s (Adults aged 14 and over)			
Activity	**1994**	**2001**	**Change**	**% Change**
Visit parks	1310.0	1592.5	282.4	21.6
Golf	521.8	633.9	112.1	21.5
Library activities	943.3	1128.7	185.3	19.6
Church activities	1775.3	2102.7	327.4	18.4
Gardening(H)	5404.6	6385.4	980.8	18.1
Walking the dog	1859.8	2195.5	335.7	18.0
Bushwalking/hiking	307.6	355.6	48.0	15.6
Art/craft/hobby(H)	2879.2	3308.7	429.5	14.9
Listening to radio(H)	10867.2	11796.7	929.5	8.6
Watch TV/Videos(H)	13360.8	14471.5	1110.7	8.3
Visit club	1417.6	1499.7	82.2	5.8
Cycling	758.9	773.1	14.1	1.9
Netball*	170.7	170.1	-0.7	-0.4
Squash	296.8	293.8	-3.0	-1.0
Visit pub	2317.9	2133.6	-184.3	-8.0
Basketball	341.8	309.2	-32.6	-9.5
Aerobics	932.9	834.9	-98.0	-10.5
Dance/go to discos*	1771.1	1453.3	-317.7	-17.9
Football (all codes)	991.3	804.0	-187.3	-18.9
* Winter/autumn estimates - the rest are summer rates (H) Home-based				

NB. More up-to-date versions of projections for sport participation can be found in A. J. Veal and R.Lynch, 2001, *Australian Leisure*, Second edn, Longman, Sydney.